

BOARD OF LEGAL DOCUMENT PREPARERS

Meeting Agenda – Monday, May 21, 2012

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 – 10:00 a.m. – Conference Room 109

General Inquiries Call: (602) 452-3378 (Certification and Licensing Division Line)

Members of the Public May Attend Meeting in Person

For any item listed on the agenda, the Board may vote to go into Executive Session for advice of counsel and/or to discuss records and information exempt by law or rule from public inspection, pursuant to the Arizona Code of Judicial Administration § 1-202(C).

CALL TO ORDERLes Krambeal, Chair

1) REVIEW AND APPROVAL OF MEETING MINUTES.....Les Krambeal, Chair

1-A: *Review, discussion, and possible action regarding approval of the regular session minutes of the meeting of March 26, 2012.*

1-B: *Review, discussion, and possible action regarding approval of the executive session minutes of the meeting of March 26, 2012.*

2) REVIEW OF PENDING COMPLAINTS.....Nancy Swetnam

2-A: *Review, discussion and possible action regarding the following certificate holder complaints:*

Complaint Number 12-L010 – George Preston Parker

Complaint Number 12-L014 – George Preston Parker

Complaint Number 09-L018 – Janneth Cardenas

2) REVIEW OF PENDING COMPLAINTS.....Linda Grau

2-A: *Review, discussion and possible action regarding the following certificate holder complaints:*

Complaint Number 05-L023 – Deborah Moldovan

Complaint Number 05-L118 – Wendy Schwingel

Complaint Number 06-L007 – Laura Tebaqui-Soto

Complaint Number 06-L085 – Sumer Jennings

Complaint Number 06-L100 – Maurie Hall

Complaint Number 08-L059 - Carol Gray

Complaint Number 05-L121 – Carol Gray
 Complaint Number 08-L058 – Jacqueline Velde
 Complaint Number 08-L078 – Darlene Landgrave
 Complaint Number 10-L035 – William Kelly
 Complaint Number 10-L052 – Darren Ortiz and Legal Awareness Arizona

2-B: Review, discussion and possible action regarding complaint number 11-L034 involving certificate holder Donna Vasquez.

2-C: Review, discussion and possible action regarding Hearing Officer Jonathan Schwartz' Report and Recommendation filed in complaint numbers 09-L094 and 10-L026 involving AAM, LLC.

2-D: Review, discussion and possible action regarding the following complaints dismissed by the Division Director pursuant to Arizona Code of Judicial Administration § 7-201(D)(4)(a) and (H)(2)(a):

Complaint Number 12-L009
 Complaint Number 11-L035

2-E: Review, discussion and possible action regarding non-certificate holder complaint number NC11-L046 involving Amelia Vieyra.

2-F: Review, discussion and possible action regarding former certificate holder National Future Benefits and non-certificate holder complaint number NC12-L022.

2-G: Report regarding the ruling issued by the Honorable Maria Del Mar Verdin in Superior Court in Maricopa County case number LC2011-000731-001 DT regarding the Petition for Special Action and Request for Injunctive Relief filed by certificate holder Carla Lief involving the Board disciplinary Final Order in complaint numbers 04-L039 and 07-L027.

2-H: Report regarding the ruling issued by the Honorable John Ditsworth in Superior Court in Maricopa County case number CV2010-082380 regarding the Petition for Special Action filed by former certificate holder Kenneth Volk involving the Board disciplinary Final Order in complaint numbers 06-L079, 06-L098, 06-L118 and 07-L011.

3) ADMINISTRATIVE ISSUESDebbie MacDougall

3-A: Report regarding State Bar of Arizona Unauthorized Practice of Law Committee Advisory Opinion 12-01.

4) INITIAL CERTIFICATION APPLICATIONSKimberly Siddall

4-A: *Review, discussion and possible action regarding the following pending applications for the 2011-2013 certification period:*

1. *Kendra Crandall*
2. *Michael Parham*
3. *Amber Ridenhour*
4. *Michael Parham*
5. *Rebakah Chapman*
6. *Julie Haigh*
7. *Katherine Trojahn*
8. *Elizabeth A. Miller-Spann*
9. *Christian Soto*
10. *Jessica Leadingham*
11. *June Pelletier*
12. *Lawrence Castrovinci*
13. *Ronda Stump*
14. *Cassandra Andrick*
15. *Concepcion Zambrano*
16. *Kenneth Lindow*
17. *Mia Olmos-Garcia*
18. *Robyn McCraw*
19. *Sandra Munier*
20. *Sharon Kuller*
21. *Legal Document Solutions, LLC (Ana Dabbs)*
22. *Life Planning Group LLC (Warner Lewis III)*

5) CERTIFICATION AND ELIGIBILITYKimberly Siddall

- 5-A: *Review, discussion and possible action regarding application for reinstatement after suspension submitted by Darren Ortiz and business entity Legal Awareness Arizona, LLC.*
- 5-B: *Review, discussion, and possible actions regarding the request for waiver of continuing education (CE) requirement for certificate holder Sherrene L. Caley.*
- 5-C: *Review, discussion and possible action regarding Hearing Officer Jonathan Schwartz's Recommendation Report involving the denial of initial certification application submitted by Leonard W. Deehan.*
- 5-D: *Review, discussion and possible action regarding Hearing Officer Jonathan Schwartz's Recommendation Report involving the denial of initial certification application submitted by Gerald Zukerman.*
- 5-E: *Review, discussion, and possible action regarding Voluntary Surrender request received from certified business Parker Egan CPAs PLLC.*

CALL TO THE PUBLIC..... *Les Krambeal, Chair*

ADJOURN..... *Les Krambeal, Chair*

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